

Public Records Committee (PRC)

Via Microsoft Teams

June 17, 2025

3:30 – 4:30 pm

Attendance: All attendees joined the meeting remotely. Below are the attendees of the meeting:

Organization	Names
4Culture	
Adult & Juvenile Detention (DAJD)	Andrea Williams
Assessor's Office (DOA)	
Boundary Review Board (BRB)	
Community & Human Services (DCHS)	Chelsea Walch
District Court (KCDC)	
Elections (KCE)	Megan Mason
Executive Services (DES)	Cindy Cawaling
Executive Services: Facilities Management (FMD)	Elizabeth Thelen
Executive Services: Records and Licensing (DES RALS)	Norm Alberg
Executive Services: Records and Licensing, Archives, Records Management, & Mail Services (DES RALS ARMMS)	Cynthia Hernandez, Hannah Soukup, Valerie Vega, Ryan Wadleigh
Executive Services: Office of Risk Management Services (DES ORMS)	Stephanie Santos, Kaitlyn Wiggins
Human Resources (DHR)	Jackie Adams
Information Technology (KCIT)	Tisa Rose Escobar, Grace Preyapongpisan, Ellie Rhodes
Judicial Administration (DJA)	Danielle Anderson
King County Council (KCC)	
Executive Office (KCEO)	
Local Services (DLS)	Margo Christianson, Greg Felton, Bryannah Quander
Metro Transit (MTD)	Mirla Santiago
Natural Resources & Parks (DNRP)	Sara Fitzgibbons
Prosecuting Attorney (PAO)	
Public Defense (DPD)	Mon-Cheri Barnes
Public Health (DPH)	Jonathan Bibler
Sheriff's Office (KCSO)	Kimberly Petty
Superior Court (KCSC)	

1. Introductions

Norm Alberg called the meeting to order at 3:31 pm.

2. Approval of Minutes

Norm called for a motion to approve the minutes from May 20, 2025. Stephanie Santos introduced the motion, and Andrea Williams seconded the motion. The minutes were approved.

3. Updates from:

- Public Records Program – The public records policy that was approved by the PRC last month has not been sent to the policy review team yet due to work on other policies and procedures. The program continues to improve sustainability on their system.
- KCIT – The Microsoft Copilot chat rollout at the county was initially anticipated within two weeks of Microsoft rolling the tool out. This has been delayed. Most members of the Business Management Council (BCM) and Deployment Review Team (DTR) have postponed their endorsement of the tool. Data and records retention is a concern. Some will have access to a pilot version of Copilot soon. KCIT is drafting an AI orientated IT policy, which will be reviewed with Executive Braddock at some point.
- Privacy Program – The program continues to work with the GRC and on a number of initiatives, including a response to the 2019 audit. Ellie Rhodes estimates giving a presentation to the PRC in August on relevant updates and information.
- KCRIGG – The group continues to address issues related to MS Purview and KCIT's practice of keeping departed employees' records for 2-3 years. This is a complex issue that includes access to the records and Purview, the varied retention period between Outlook files and One Drive files, and KCIT and Modern Workplace's limited resources for providing direct support to departments. Cynthia encourages all to consider the impacts (both benefits and risks or costs) of discontinuing the practice of storing employee files for 2 or 3 years post departure, especially in light of the fact that the storage of employee files is not the same as records management, and given that KCIT has no resources available for providing the stored files to business units, and instead wants to redirect the work associated with the searching for and production of files to departments. Cynthia explained that the tie-in to MS Purview is that it's the method for searching for such files. And the only authorized users of MS Purview (in some but not all departments) is through Public Records Officers (who are sometimes, but not always, also Agency Records Officers). The current state and related frustrations were discussed. Several people shared their experiences, including Mon-Cheri Barnes, ARO for the Department of Public Defense, and Sara Fitzgibbons, ARO/PRO for the Department of Natural Resources and Parks. KCIT currently has published on their web site guidance that directs managers to seek assistance from Public Records Officers (PROs) for finding former employee records, and again, not all PROs are authorized or know how to use MS Purview. Additionally, the referral to PROs for help was not discussed with PROs nor the Public Records Program prior to the change being made on KCIT's web page and in their workflows. While the number of records under these former employee storage holds is unknown, Modern Workplace does not get an insignificant number of requests for the data. Thus, the work involved is not insignificant. Cynthia acknowledged the frustration and suggested that until a more certain future state is determined, the best guidance is for PROs who receive such requests for assistance in finding former employee files that are centrally stored by KCIT to work with their Customer Success Manager (CSM) to find resolution. She also noted that utilizing good records management throughout an employee's service and at the time of offboarding can help mitigate records management problems when the depart.

4. ARMMS Update

- Records Management Program – The Records Management policy is pending executive signature. There have been discussions on with the Executive Office related to the inclusion of Microsoft Teams chat guidance and a requirement for annual training. Norm explained to the Executive Office that the program does not put specific tools or software in the policy because specific tools and software change. The discussion and policy finalization is ongoing. The Records Management Program is implementing updates to the Assessor's and Treasurer's retention schedules from the state, which only affect a few county employees. Guidance on capital improvement and executive communications retention from the state is pending. There will be a Content Manager upgrade at the end of July, which will primarily include backend updates that most users will not notice.
- PRC Annual Report/Digital Communications Survey – Thanks to all who completed the communications survey, which has closed. Contact Cynthia if you would still like to provide information. PRC members should expect to see a report on PRC activities by 6/24. A vote to approve that report is due on 7/10 and the report is due to the DES Director's Office by 7/15. This is a tight timeline.
- Archives update – Hannah Soukup shared a [draft environmental impact statement](#) for the digital asset management policy. She will also share draft appraisal guidelines and rubrics for archives staff. These guidelines will take the environment, DEI, and better representation of archival material into account.

5. Call for Issues/Awareness/ Concerns

- Dept./Agency Updates or Sharing – Megan Mason encourages all to share what they are working on – including what may make you proud, or scared, or motivated. Related items were discussed during the KCRIGG update.

Good of the Order and Summarize Take-away Messages access.

- The Copilot chat rollout timeline will be reevaluated. Some will be part of a pilot group and have access to the tool sooner.
- The Privacy Program will tentatively give a presentation in August.
- KC RIGG – The Purview hold issue is ongoing. All are encouraged to consider the impact of ending the practice of keeping departed employee records for 2-3 years ended. Consider the causes of any discomfort in discontinuing. This practice puts a lot of stress on staff. There was a discussion on the challenges with this process. Cynthia recommends working with CSMs to address relevant challenges, although that process is imperfect.
- As a reminder, onboarding and offboarding employee records managements can prevent a lot of later records issues.
- The records policy update is pending executive signature; some issues have held finalization up.
- There are retention schedule updates for the Assessor's and Treasurer's.
- A Content Manager update is expected at the end of July.
- The digital communications survey has closed. Thanks to all who completed it. Contact Cynthia to still provide feedback.

- All are encouraged to watch out for actions and communications about the PRC annual report and to respond in a timely manner.
- All are encouraged to review the Archive's environmental impact statement.
- KC Archives is working on appraisal improvements.
- Although the KCRIGG update in this meeting did not cover transcription, the group continues to address it and is aware that there are allowances in transcription, despite the feature being turned off.
- The next PRC meeting is on July 15.

The meeting adjourned at 4:30 pm.